



Foreign Agricultural Service

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Croatia

Fishery Products

Croatian Seafood Situation

2002

Approved by:

Paul Spencer-MacGregor

U.S. Embassy-Vienna

Prepared by:

Andreja Misir

Report Highlights: In spite of Croatia's lengthy Adriatic coastline, the country suffers from over fishing and is struggling to catch and produce enough seafood to meet demand. Croatia's fishing fleet is inadequate as is the infrastructure needed to transport and process seafood. Meanwhile the demand for seafood is increasing as Croatia becomes a more popular tourist destination. The decline in supply and increase in demand could mean a growing market opportunity for U.S. seafood exporters.

Includes PSD changes: No
Includes Trade Matrix: No
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Seafood

Croatia's annual catch has declined steadily despite intensified fishing. Over fishing is common for a variety of species and Croatia's poorly equipped fishing fleet is not very active outside of the Adriatic. An increase in government oversight and smaller annual quotas for fisherman are expected. Fishing will also be banned altogether for some species and in some areas. Some efforts are being made to expand the reach of Croatia's fleet to beyond its 24,000 square km of territorial waters.

In contrast to fishing, fish farming has resulted in an overproduction of a limited number of species and a decline in prices. The industry is looking to introduce new fish and shellfish species and to modernize existing facilities that specialize in breeding tuna, sea bass and sea bream.

The processing and refrigerated transportation sectors face widely dispersed (and small) collection points. There are no private warehouses or shipping centers and private companies, though numerous, are not investing in the sector. Six main processing facilities are working at only 35% of capacity.

The Croatian government has made increasing fish consumption a strategic goal. Current consumption is low, only 7kg per capita (including all types of seafood).

While Croatia remains a net exporters of fish, declining harvests and increases in consumption point to increasing opportunities for U.S. fish exporters.

Table 1: Consumption of Seafish and Processed Seafish from 1994-1999 (T).

	1994	1995	1996	1997	1998
Fish, Farmed and Wild	5,032	3,231	3,562	5,450	12,86
Canned Fish - Croatian	2,204	3,340	3,427	2,437	1,820
Canned Fish - Imported	1,660	1,809	2,756	1,301	2,067
Deep Frozen Fish - Imported	7,286	8,758	10,330	12,081	10,65
Total	16,182	17,132	20,075	21,269	27,41
Consumption per capita (kg)	3.6	3.8	4.5	4.7	6.7

Table 2: Balance of Import and Export of Seafood from 1995-1999 (USD).

	1995	1996	1997	1998
Total Export of Seafood	45,600	49,595	60,601	43,359
Total Import of Seafood	22,941	27,924	29,954	29,401
Positive Difference	22,759	27,671	30,647	13,958